Documents Master

According to AML guidelines, few documents are mandatory to be submitted to purchase Insurance policies.

KYC required at the time of policy login

Documents Types	Required
Recent Photograph	☑
Age / Date of Birth Proof	☑
Identity Proof	☑
Address Proof	☑
Income Proof	☑
Proposal Form	☑
Other documents	- PAN card on 50K and above premium - ECS mandate (For monthly mode)

Generally Accepted Document types:

Age Proof	Passport/ 10th or 12th certificate, Driving License
ID Proof	Pan card, Passport, D.L., Voter's Id Card, Adhaar Card
Address Proof	Passport, D.L., Adhaar Card, Voter's ID Card, Utilities Bills, Employer's Certificate, Rental Agreements
Income Proof	Salary Slip of the last three months, IT returns, Form 16, Bank Statement of the last 6 months

Process of policy issuance:

Step 1: Use the filters to pin down your requirements. Choose the preferred plan and then proceed further.

Step 2: Fill up the basic details and proceed to pay for the policy. You will receive payment acknowledgement on your registered mail id.

Step 3: Fill up the proposal form and additional questionnaires, if any.

Step 4: Arrange the filled up proposal form, documents to be submitted as explained in the mail received.

Step 5: Submit the documents to us/insurers.

Step 6: Medicals may or may not be required. If required, the same is arranged by the insurer at this stage.

Step 7: Policy is issued once the medical and financials are confirmed acceptable as per policy terms by the insurers.

Step 8: Policy copies are provided to you at your registered communication addresses.

How to submit documents: (Options)

- Scan copy upload via email

- Scan copy upload on the customized web-link provided by the Policybazaar customer service

- Copies of documents couriered to

"**Customer Support- Investment, Policybazaar.com, Plot no- 123, Sector 44, Gurgaon – 122001**"

Document submission does not guarantee policy issuance. This is not an exhaustive list. The requirement may vary depending on customer's profile. Additional documents/ reports might be required post risk assessment by insurers.